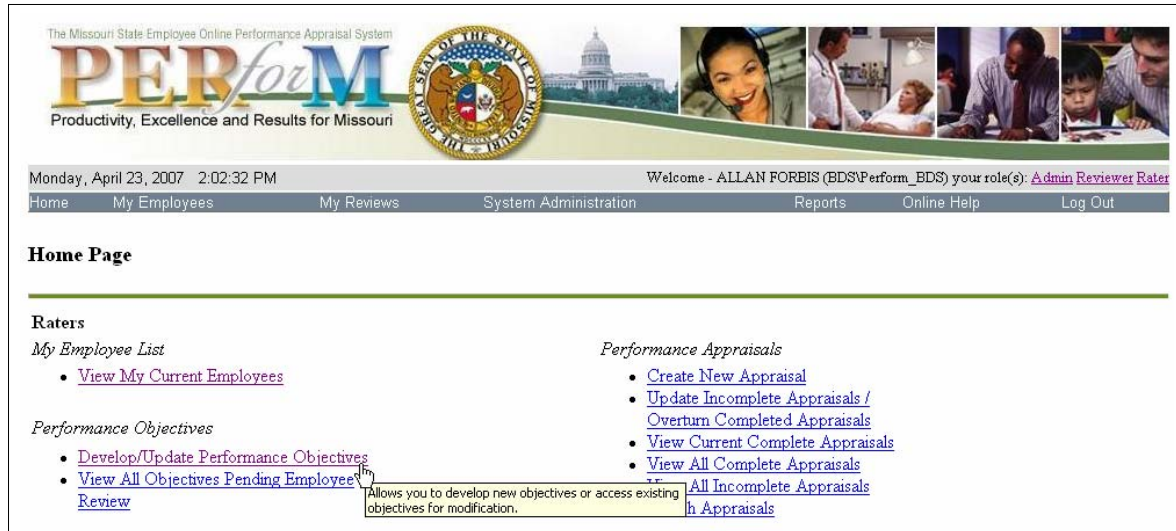


Creating and Updating Objectives for Performance Components

There are two ways in which a Rater can begin the process of developing and updating performance objectives for an employee. From the Rater's Home Page, the Rater can

1. Use the clickable link on the action word 'Develop/Update Performance Objectives.'




OR:

2. Select 'Develop/Update Performance Objectives' from the My Employees drop-down menu.



Once the Rater selects (clicks) either link, the Rater will be taken to the Employee List – Performance Objectives screen. This screen displays a list of the employees supervised by the Rater.



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[Home Page](#) > [Select Employee - Performance Objectives](#)

Employee List - Performance Objectives [How to Add or Copy Objectives](#)

You are responsible for supervising and appraising the following employees. (Click on any column heading to sort data by that column in ascending order.) Click on an employee's name to develop/update performance objectives.

(2) total employees

Employee Name	Title Code	Job Title	Organization Name	Supervisor
LEVY, KELLY ANN	000493	TRAINING TECH III	PERS-STAFF	Yes
SCROGGINS, CYNTHIA	000493	TRAINING TECH III	PERS-STAFF	Yes

Once the Rater clicks on the name of the employee for whom he/she wishes to add/edit objectives, the Rater will view the Develop/Update Performance Objectives screen.



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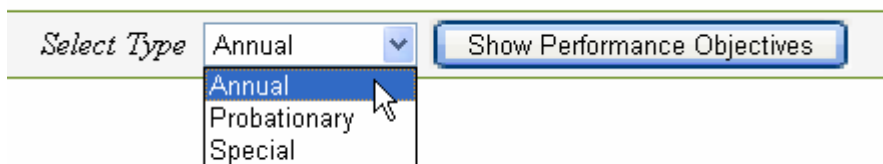
Employee Performance Objectives

Employee Information [Create New Appraisal](#)

Employee Name	LEVY, KELLY ANN	Organization	PERS-STAFF
Job Title	TRAINING TECH III	Supervisor	Yes

Select Type





From this screen, the Rater must select the type of appraisal to work with (Annual, Probationary or Special) and then click the 'Show Performance Objectives' button to proceed.



Select Type

Annual
Probationary
Special

After the selection has been made and the 'Show Performance Objectives' button has been clicked, the Rater will view the Employee Performance Objectives screen which displays the selected employee's objectives and provides options to add, edit and delete objectives or copy objectives from another employee.

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[Home Page](#) > [Select Employee - Performance Objectives](#) > Develop/Update Performance Objectives

Employee Performance Objectives - Annual

Employee Information
[Create New Appraisal](#)

Employee Name	LEVY, KELLY ANN	Organization	PERS-STAFF
Job Title	TRAINING TECH III	Supervisor	Yes

Select Type: Annual
[Show Performance Objectives](#)

All Annual Performance Objectives have been reviewed with your employee and all the necessary signatures have been obtained on a Performance Plan document. Is this correct?

☐ Yes ☒ No

[Performance Objectives Summary](#)
[Collapse Component Details](#)
[Expand Component Details](#)

- (Knowledge of Work) has (3) objective(s)
- (Quality of Work) has (1) objective(s)
- (Situational Responsiveness) has (1) objective(s)
- (Initiative) does not have any objectives.
- (Dependability) does not have any objectives.
- (Performance Planning and Documentation) does not have any objectives.
- (Leadership Skills) does not have any objectives.
- (Management Skills) does not have any objectives.

3
1
4

(5) total objectives

[Delete Selected Objectives](#)
[Add Objectives](#)
[Copy Objectives](#)
[Performance Plan Print Preview](#)

Select All	Edit	Objective Description	Component Name
<input type="checkbox"/>	Edit	Learn the Management Training Rule and how each program we provide corresponds to the Rule.	Knowledge of Work
<input type="checkbox"/>	Edit	Review all materials for each training program you conduct at least two days prior to the session and discuss any questions or concerns with your co-trainers and supervisor.	Knowledge of Work
<input type="checkbox"/>	Edit	Research topics pertaining to all training programs assigned to you to enhance your understanding of the program's content, keep up-to-date with the latest trends; and improve the program's effectiveness.	Knowledge of Work
<input type="checkbox"/>	Edit	Proofread all training materials and/or correspondence to ensure that all materials/documents are error free.	Quality of Work
<input type="checkbox"/>	Edit	Respond to unexpected scheduling changes in a manner that does not impact program content and quality.	Situational Responsiveness

The PERforM system provides individual windows for four specific performance objective actions:

- 1 Add objectives
- 2 Edit objectives
- 3 Delete objectives
- 4 Copy objectives from another employee

Adding Objectives

To add objectives, the Rater will click the “Add Objectives” button. When the “Add Objectives” button is clicked, the Add Performance Objectives screen is opened. The Rater can add new objectives in this screen by typing in the objective description, choosing a performance component from the drop-down list and clicking either **“Save”** or **“Save & Add More”**.

When the Rater clicks **“Save”**, the new objective will be saved to the database and a message appears which indicates that the objective has been successfully added. The new objective appears in a list on the right side of the screen so that the Rater can see what objective they have added.

When a Rater clicks **“Save & Add More”**, the new objective will be saved to the database and the objective description will be cleared out. A message will appear indicating that the objective has been successfully added.

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Home Page > Select Employee - Performance Objectives > Develop/Update Performance Objectives

Employee Performance Objectives - Annual

Employee Information [Create New Appraisal](#)

Employee Name	LEVY, KELLY ANN	Organization	PERS-STAFF
Job Title	TRAINING TECH III	Supervisor	Yes

Objective Description: Takes the initiative to anticipate necessary steps to complete work and prepare for those steps ahead of time.

Component: Initiative

Buttons: Save, Save & Add More, Cancel, Back to Objectives

Message: Objective successfully added.

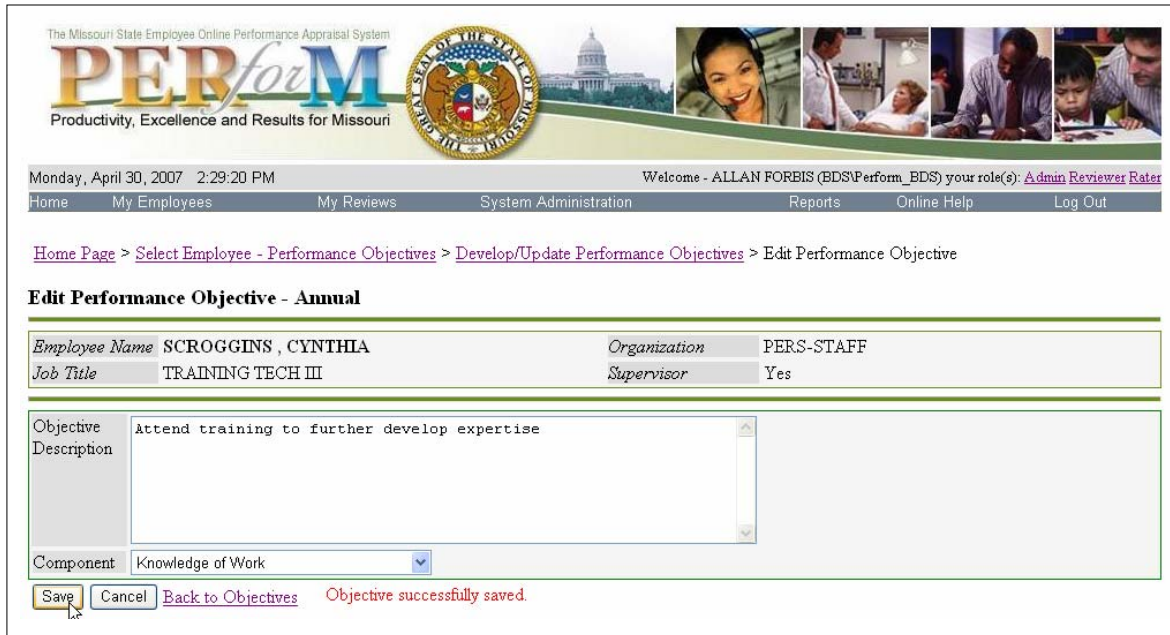
(1) objectives added.

Performance Objectives	Component
Takes the initiative to anticipate necessary steps to complete work and prepare for those steps ahead of time.	Initiative

When the Rater goes back to the Develop/Update Performance Objectives screen, he or she can see all of the objectives they have assigned to the employee for the type of appraisal (Annual, Probationary or Special) they are working with.

Editing Objectives

When the “Edit” hyperlink is selected next to an existing objective on the Develop/Update Performance Objectives screen, a new window opens. In this new “Edit Performance Objectives” screen, the Rater can alter the objective description, change the component that the objective is associated with, or change the type of appraisal that the objective is associated with.



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[Home Page](#) > [Select Employee - Performance Objectives](#) > [Develop/Update Performance Objectives](#) > Edit Performance Objective

Edit Performance Objective - Annual

Employee Name	SCROGGINS, CYNTHIA	Organization	PERS-STAFF
Job Title	TRAINING TECH III	Supervisor	Yes

Objective Description: Attend training to further develop expertise

Component: Knowledge of Work

[Save](#) [Cancel](#) [Back to Objectives](#) Objective successfully saved.

Deleting Objectives

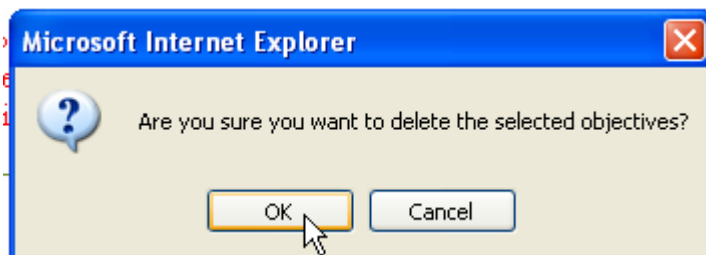
To delete an objective, click in the box next to the objective on the Develop/Update Performance Objectives screen and then click the “Delete Selected Objectives” Button:

The screenshot displays the PERforM web application interface. At the top, there is a header with the PERforM logo and navigation links. Below the header, the user is logged in as ALLAN FORBIS. The main content area is titled "Employee Performance Objectives - Annual". It shows employee information for LEVY, KELLY ANN, and a table of performance objectives. The table has columns for "Select All", "Edit", "Objective Description", and "Component Name". One objective is selected for deletion.

Select All	Edit	Objective Description	Component Name
<input type="checkbox"/>	Edit	Displays a significant level of skill executing daily tasks	Knowledge of Work
<input checked="" type="checkbox"/>	Edit	Review all materials for each training program you conduct at least two days prior to the session and discuss any questions or concerns with your co-trainers and supervisor.	Knowledge of Work

If a Rater wants to delete all the objectives, he or she can click the box next to the words “Select All” and then click the delete selected objectives button.

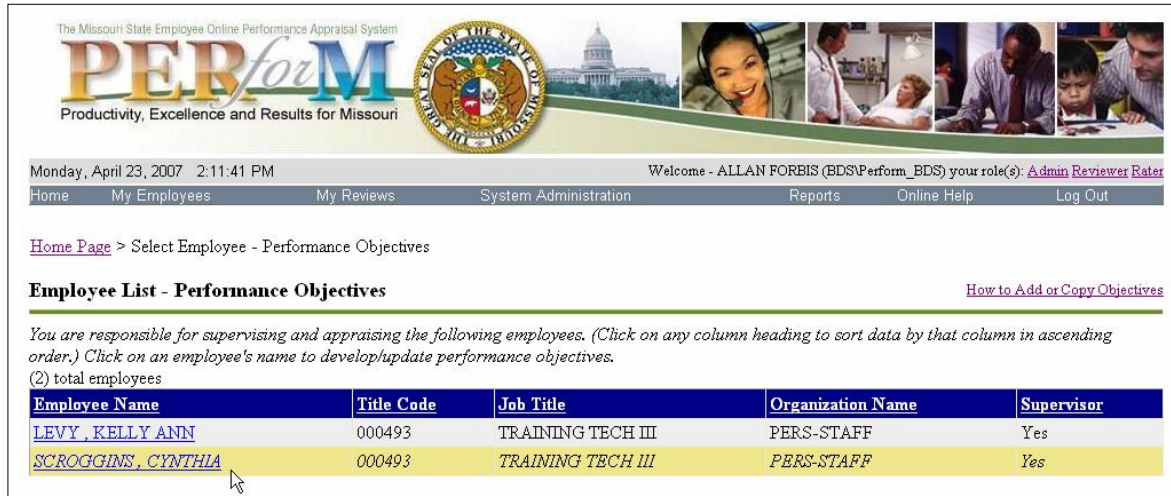
When one or more objectives are selected to delete, a confirmation message will be displayed. Click “Ok” to delete the selected objectives:



A message will be displayed indicating the objectives were successfully deleted and the screen is refreshed:

Copying Objectives for One Employee from Another Employee

To initiate this function, the Rater must first select the employee for whom they want to create objectives for from their employee list on the Performance Objectives screen.



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[Home Page](#) > [Select Employee - Performance Objectives](#)

Employee List - Performance Objectives [How to Add or Copy Objectives](#)

You are responsible for supervising and appraising the following employees. (Click on any column heading to sort data by that column in ascending order.) Click on an employee's name to develop/update performance objectives.

(2) total employees

Employee Name	Title Code	Job Title	Organization Name	Supervisor
LEVY, KELLY ANN	000493	TRAINING TECH III	PERS-STAFF	Yes
SCROGGINS, CYNTHIA	000493	TRAINING TECH III	PERS-STAFF	Yes

Clicking on the employee's name will bring up a screen for the Rater to indicate the type of appraisal they are developing performance objectives for (Annual, Probationary, Special). The Rater will select the type of appraisal and click the 'Show Performance Objectives' button.



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[Home Page](#) > [Select Employee - Performance Objectives](#) > [Develop/Update Performance Objectives](#)

Employee Performance Objectives

Employee Information [Create New Appraisal](#)

Employee Name	SCROGGINS, CYNTHIA	Organization	PERS-STAFF
Job Title	TRAINING TECH III	Supervisor	Yes

Select Type:

This displays any objectives that the employee may already have for that appraisal type.

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[Home Page](#) > [Select Employee - Performance Objectives](#) > Develop/Update Performance Objectives

Employee Performance Objectives - Annual

Employee Information [Create New Appraisal](#)

Employee Name	SCROGGINS, CYNTHIA	Organization	PERS-STAFF
Job Title	TRAINING TECH III	Supervisor	Yes

Select Type: Annual

All Annual Performance Objectives have been reviewed with your employee and all the necessary signatures have been obtained on a Performance Plan document. Is this correct? ☐ Yes ☒ No

[Performance Objectives Summary](#) [Collapse Component Details](#) [Expand Component Details](#)

- (Knowledge of Work) has (3) objective(s)
- (Quality of Work) has (1) objective(s)
- (Situational Responsiveness) has (1) objective(s)
- (Initiative) has (1) objective(s)
- (Dependability) does not have any objectives.
- (Performance Planning and Documentation) does not have any objectives.
- (Leadership Skills) does not have any objectives.
- (Management Skills) does not have any objectives.

(6) total objectives

<input checked="" type="checkbox"/> Select All	Edit	Objective Description	Component Name
<input type="checkbox"/>	Edit	Complete 7 Habits of Highly Effective People certification by June 30.	Knowledge of Work

The rater clicks the copy objectives button and is taken to a page where they can select an employee to copy from:

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[Home Page](#) > [Select Employee - Performance Objectives](#) > [Develop/Update Performance Objectives](#) > Copy Performance Objective

Copy Performance Objectives - Annual [How to Copy Objectives](#)

Employee Name	SCROGGINS, CYNTHIA	Organization	PERS-STAFF
Job Title	TRAINING TECH III	Supervisor	Yes

Copy objectives from:

Select Employee
LEVY, KELLY ANN
SCROGGINS, CYNTHIA

[Back to Objectives](#)

After selecting a person, a list of objectives is displayed. The Rater then selects the objectives he or she wishes to copy from the list by checking the box next to the objectives and then clicking the copy button.

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[Home Page](#) > [Select Employee - Performance Objectives](#) > [Develop/Update Performance Objectives](#) > Copy Performance Objective

[How to Copy Objectives](#)

Employee Name SCROGGINS , CYNTHIA
Job Title TRAINING TECH III

Organization PERS-STAFF
Supervisor Yes

Copy objectives from LEVY , KELLY ANN

(11) objectives

Select	Objective Description	Component Name
<input checked="" type="checkbox"/>	Learn the Management Training Rule and how each program we provide corresponds to the Training Rule.	Knowledge of Work
<input type="checkbox"/>	Facilitate three training programs each week.	Quality of Work
<input checked="" type="checkbox"/>	Proofread all training materials and/or correspondence to ensure that all materials/documents are error free.	Quality of Work
<input type="checkbox"/>	Demonstrate prescribed resolution strategies when confronted with difficult participant behaviors when training.	Situational Responsiveness
<input type="checkbox"/>	Ensure training materials are prepared and ready at least two days in advance of training sessions.	Initiative
<input type="checkbox"/>	Arrive in the Training Room to greet participants at least 30 minutes prior to each session you present.	Dependability
<input type="checkbox"/>	Complete performance planning and appraisals for all staff you supervise according to established policy requirements.	Performance Planning and Documentation
<input type="checkbox"/>	Identify and implement at least one professional development activity for each employee you supervise.	Leadership Skills
<input type="checkbox"/>	Conduct weekly meetings with your staff to ensure that their work assignments are progressing as directed.	Management Skills

[Back to Objectives](#)

The following message appears and the user can either select additional objectives to copy or go back to objectives.

Objectives successfully copied.

[Back to Objectives](#)